City of Columbia

County of Boone

Boone County/City of Columbia *Proposal Submission Instructions*

Boone County

- ❖ Children's Services Funding
- ❖ Community Health and Medical Funding

City of Columbia

- ❖ Social Services Funding

Table of Contents

Contact Information

For questions or to report technical difficulties, please contact:

Boone County	Boone County Community Services 573.886.4298 communityservices@boonecountymo.org www.showmeboone.com/communityservices

City of Columbia	Division of Human Services 573.874.7488 humanservices@gocolumbiamo.com www.gocolumbiamo.com (search: Human Services)

Introduction

The Boone County Community Services Department and the City of Columbia Division of Human Services utilize a web-based funding management system through which proposals for community-based funding must be submitted. These instructions are intended to assist organizations in submitting proposals in response to Requests for Proposals (RFPs) issued by the City and County, utilizing the web-based funding management system.

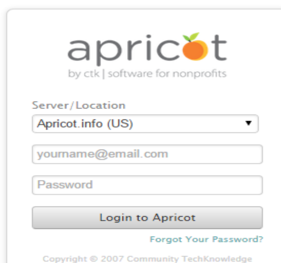
Section 1: Accessing the System

Currently the City and County utilize Apricot by CTK® (Apricot) as a joint funding management system. To access the system:

1. Copy and paste the following link to their internet web browser (preferably Google Chrome): https://ctk.apricot.info/auth.

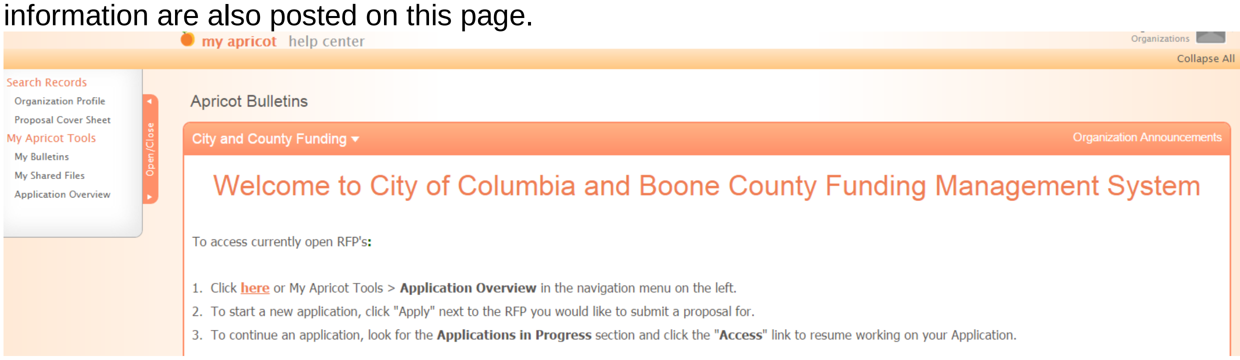
PLEASE NOTE
Users **MUST** access the system using either Google Chrome (recommended) or Mozilla Firefox as the internet browser.

2. Enter Username and Password.



PLEASE NOTE
If your organization does not currently have an Apricot account, please contact the administrator of the RFP to which you are responding. Only one login is granted per organization and logins are valid for all sources of funding.

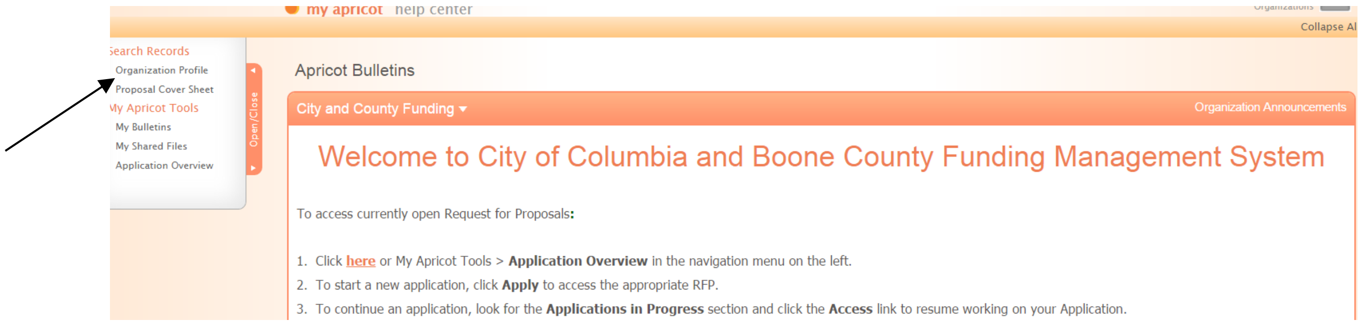
3. Once you are logged in, you will be navigated to your **MY Apricot** page. This is one of the main pages users will utilize in navigating the system. Bulletins containing important information are also posted on this page.



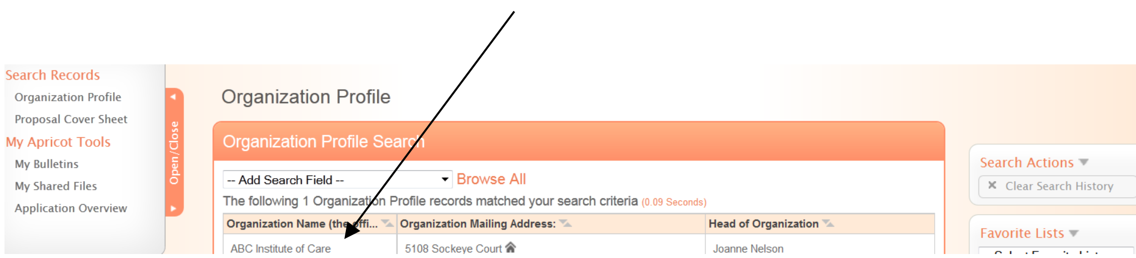
Section 2: Organization Profile

This section will show you how to access and update your **Organization Profile**.

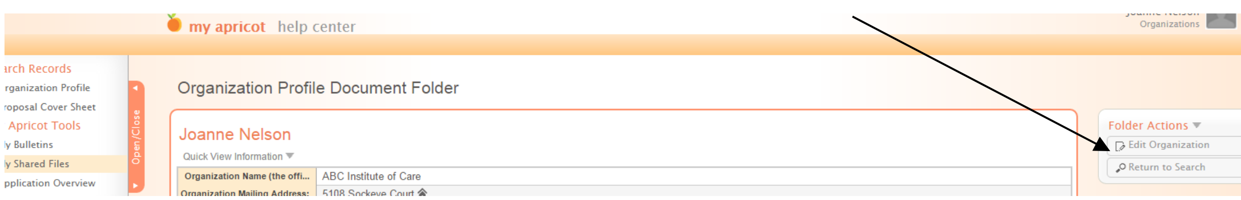
1. In the navigation menu on the left side of the screen, click on **Search Records: Organization Profile**



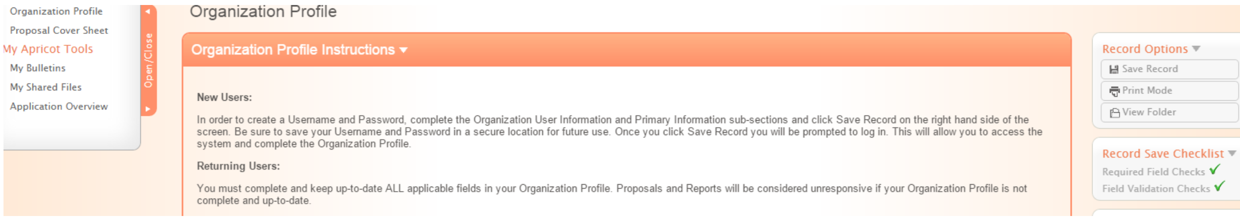
   a. This will navigate you to your **Organization Profile Folder** which contains an **Organization Profile Search** section in which your organization name is listed. Click on your organization's name.



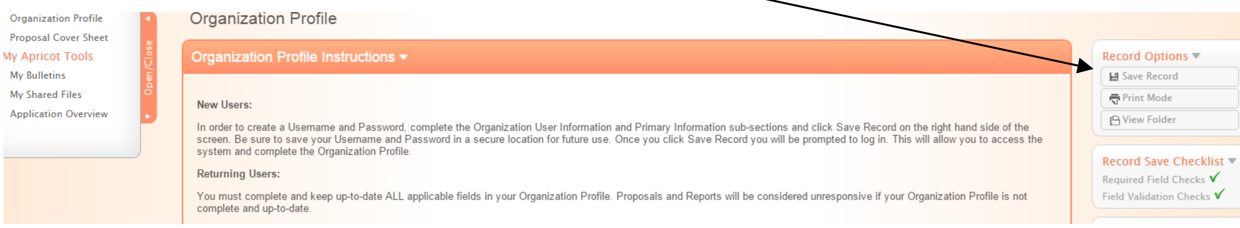
   b. This will navigate you to your **Organization Profile Folder.** Click on **Edit Organization** in the **Folder Actions** box to access your **Organization Profile**.



c. The **Organization Profile** contains fields in which you will enter information and upload documents pertaining to your organization. Complete or update ALL applicable fields in your **Organization Profile**. Proposals will be considered unresponsive if the **Organizational Profile** is not complete or up-to-date.



d. To save the information you have entered in your Organization profile, click **Save Record** under **Record Options** as you work on completing these fields and when it is complete.

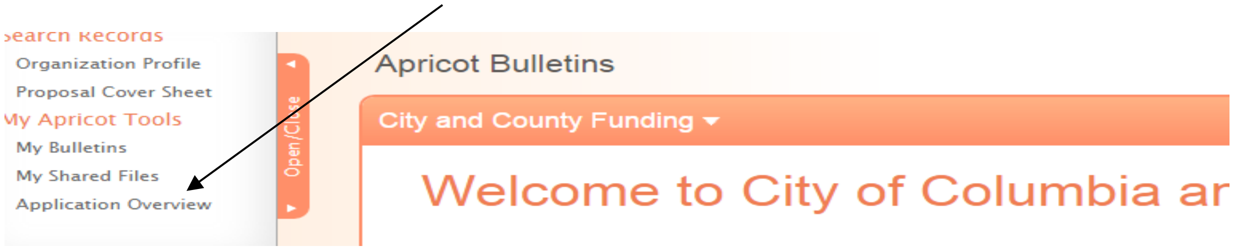


REMINDER
All sections and sub-sections of the **Organization Profile** must be completed before submitting a proposal. Proposals will be considered nonresponsive if any applicable fields are incomplete.

Section 3: Accessing Open RFPs

This section provides instructions for viewing and accessing any open RFPs.

1. To see if there are any open RFPs, click on the **Application Overview** in the white navigation menu on the left side of the screen.



2. This will navigate you to the **Application Overview** page which will list any **Available** (open) RFPs. Click on the **Apply** hyperlink for the applicable RFP to access a **Proposal Cover Sheet**.


Available

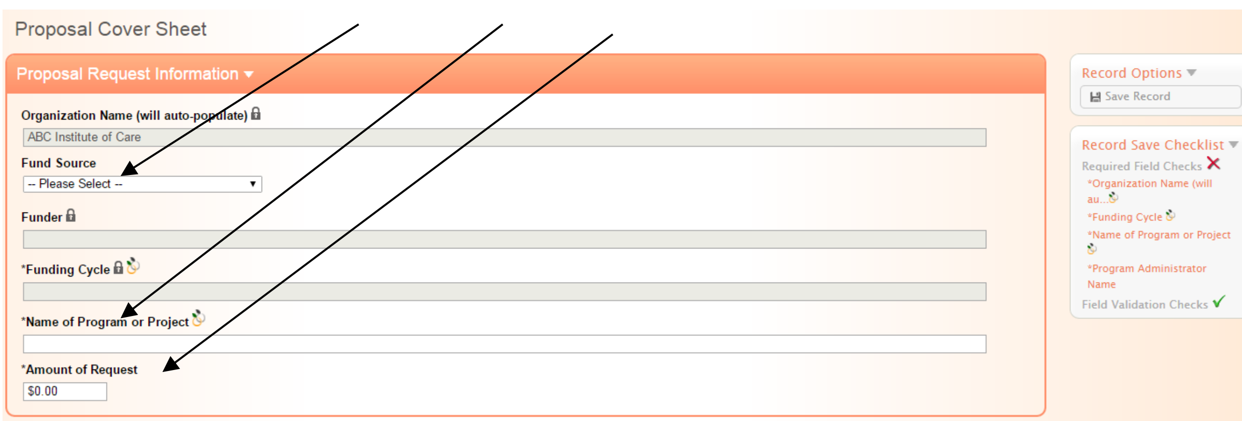
Name	Description	
Community Health/Medical Fund - PILOT	Pre-proposal conference 5/18/15 at 1:00 p.m. in the Commission Chambers at the Government Center. DUE 6/15/15 at 5:00 p.m.	Apply
Community Health/Medical Fund- PURCHASE OF SERVICE	Pre-proposal conference 5/18/15 at 1:00 p.m. in the Commission Chambers at the Government Center. DUE 6/15/15 at 5:00 p.m.	Apply
Children's Services Fund - PURCHASE OF SERVICE	Pre-proposal conference 5/18/15 at 1:00 p.m. in the Commission Chambers at the Government Center. DUE 6/15/15 at 5:00 p.m.	Apply

Section 4: Proposal Forms

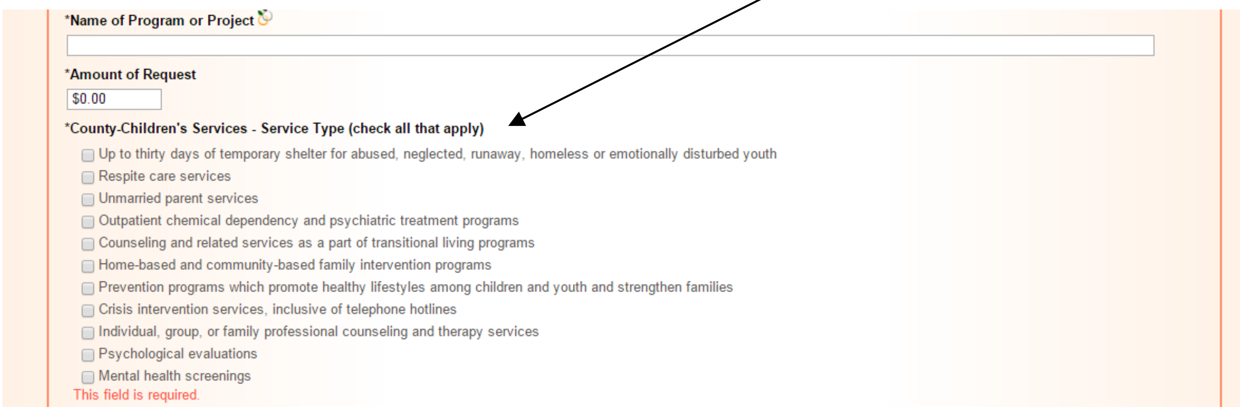
This section provides step-by-step instructions to access and complete proposal forms.

4.1 Cover Sheet

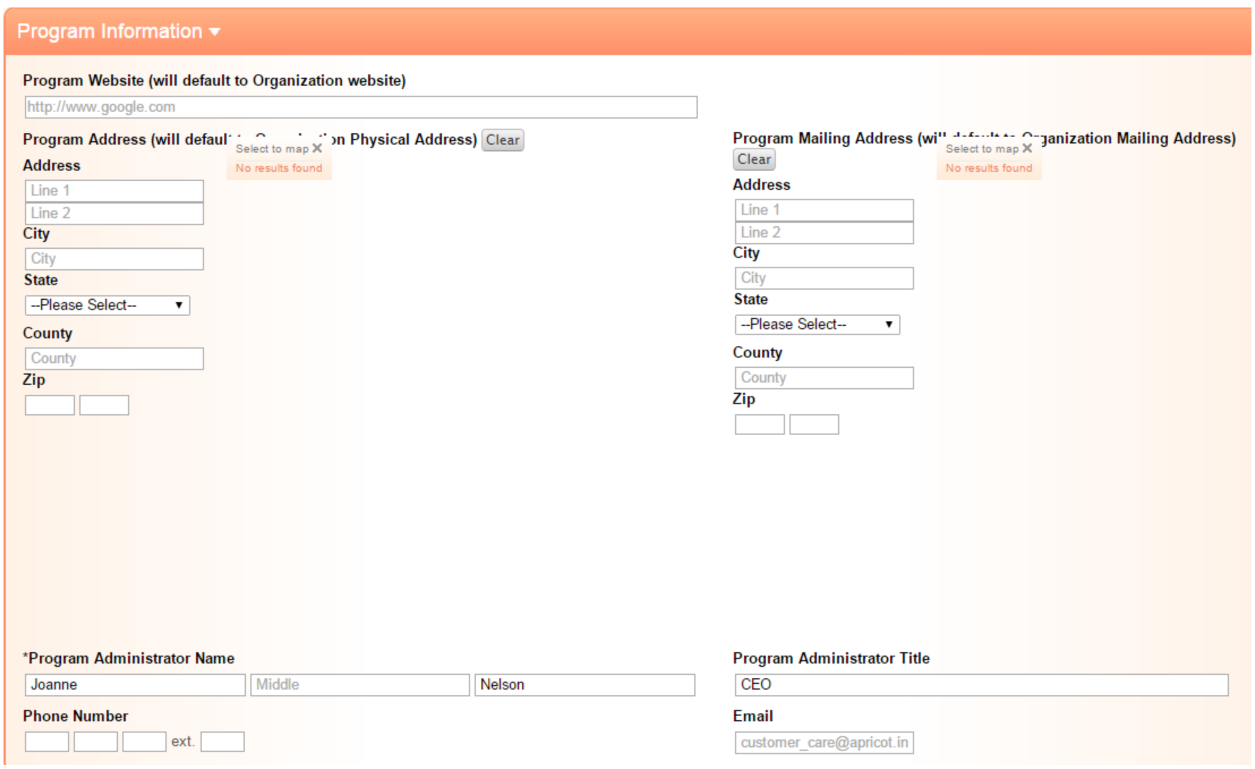
1. Per the Section 3, clicking on the **Apply** hyperlink for the RFP for which you would like to submit a proposal will navigate you to a **Proposal Cover Sheet**. Under the **Proposal Request Information** section complete the **Fund Source** (make sure that this matches the RFP for which you clicked apply on the **Application Overview** page), **Name of Program or Project**, and the **Amount of the Request**. The **Organization Name**, **Funder**, and **Funding Cycle** will all auto-populate.



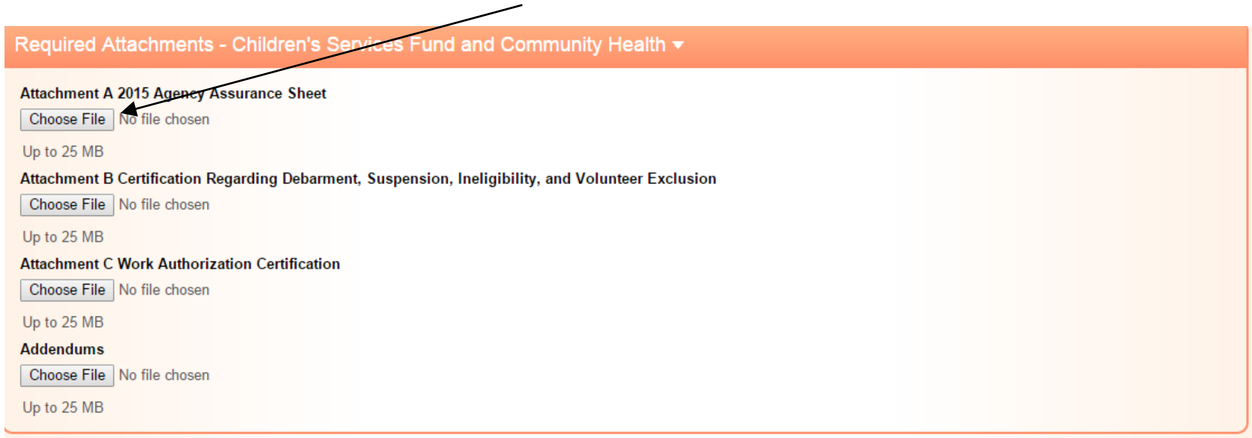
2. Once the **Fund Source** is chosen, depending on the RFP, other fields will appear that require completion. Complete all other information in the **Program Request Information** sub-section.



3. Scroll down and complete all the fields in the **Program Information** section.



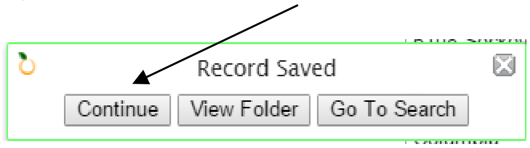
4. Some RFPs require additional **Attachments** or **Addendums** which must be uploaded in the fields provided in the include **Required Attachments** section. As applicable, these fields must be completed before submitting the proposal.



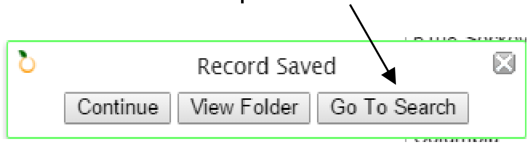
5. To save the information you have entered in the **Cover Sheet**, click **Save Record** under **Record Options**.

After clicking **Save Record**, a pop up window will appear. This same pop up will appear every time **Save Record** is clicked. You will then choose the applicable action.

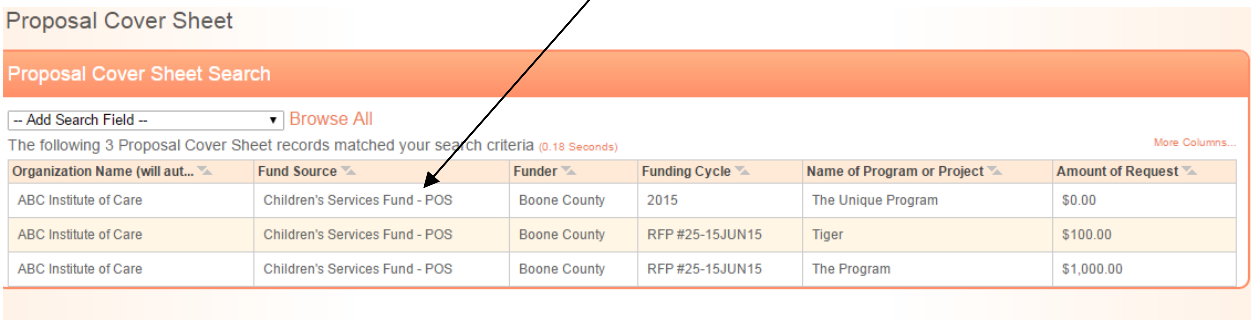
a. If you would like to continue to work on the **Cover Sheet**, click on **Continue.**



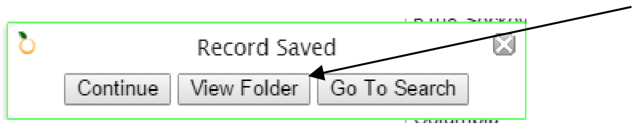
b. If you click **Go To Search**, you will be navigated back to the **Proposal Cover Sheet Folder** that lists all of the cover sheets for proposals that the organization has started or completed.



For example, the **Proposal Cover Sheet Folder** for this organization indicates the organization has three **Cover Sheets**. Any one of these may be clicked to access the cover sheet.



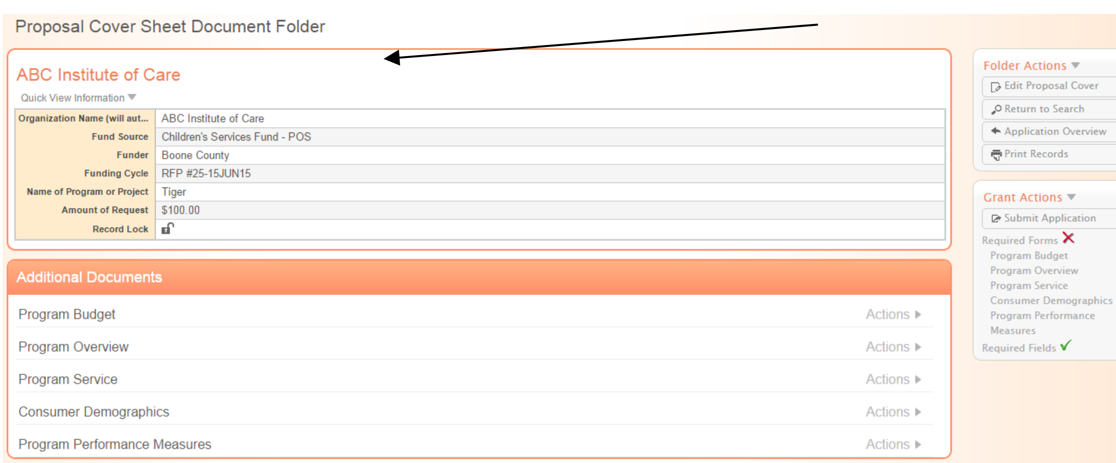
c. If **View Folder** is clicked, you will be navigated to the **Proposal Cover Sheet Document Folder** which will allow you to begin the completing the proposal forms, per Section 4.2 below.



PLEASE NOTE
While not a requirement, it is highly recommended that you complete all the information in the **Organization Profile** and the **Program Cover Sheet** sections before beginning a proposal as information from these forms are auto-populated in the proposal forms. The **Name of the Program or Project** and the **Amount Requested** can be changed or saved at any time in the **Cover Sheet**.

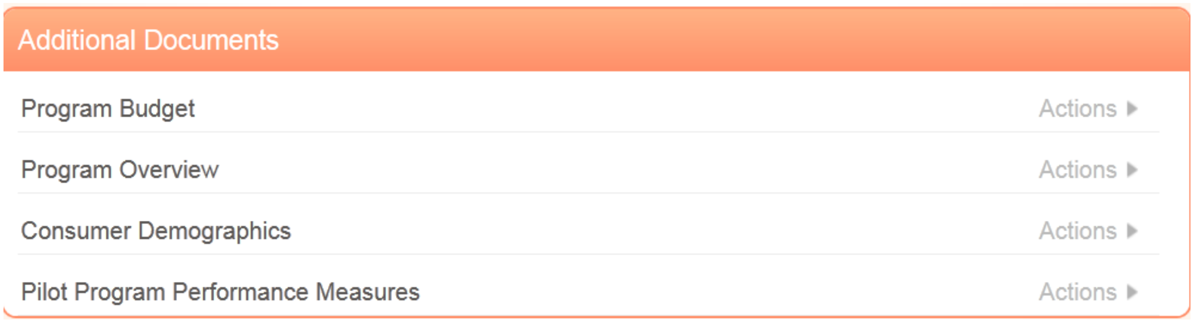
4.2 Proposal Cover Sheet Document Folder

1. Once you have completed a **Cover Sheet**, you will navigate to the **Proposal Cover Sheet Document Folder**, per the Section 4.1. The **Proposal Cover Sheet Document Folder** contains all of the information and forms for each proposal.



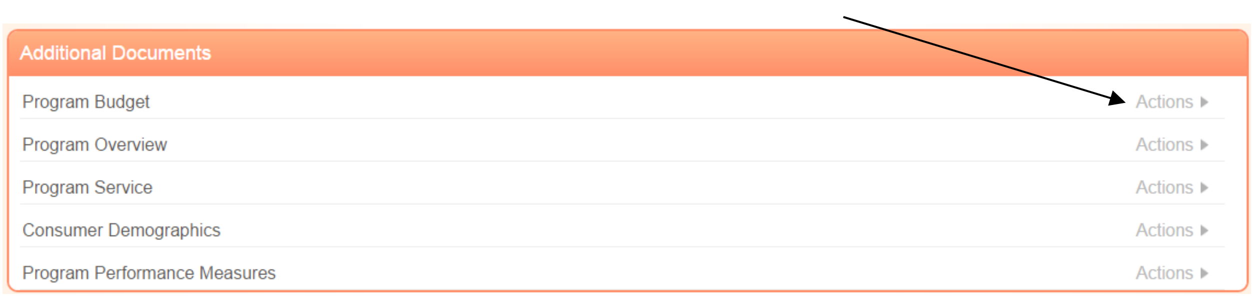
2. The next step is to complete each of the forms in the **Additional Documents** section. For Purchase of Service (POS) RFP applications, the **Proposal Cover Sheet Document Folder** will look like this:

For Pilot RFP applications, the **Proposal Cover Sheet Document Folder** will look like this:



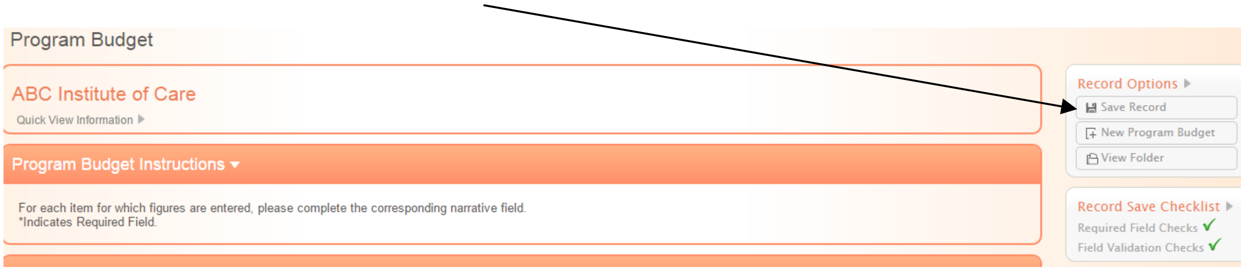
PLEASE NOTE
Pilot RFP applicants are not required to complete the **Program Services** document and the **Pilot Program Performance Measures** document is slightly different than the **POS Program Measures** document. These documents are auto-populated based on the RFP that is chosen on the **Application Overview** page.

3. To open a form, click on the **Action** link arrow on the right-hand side of the box. When you hover over the word **Action**, **Create New** will appear. Click on **Create New** to create a new form.



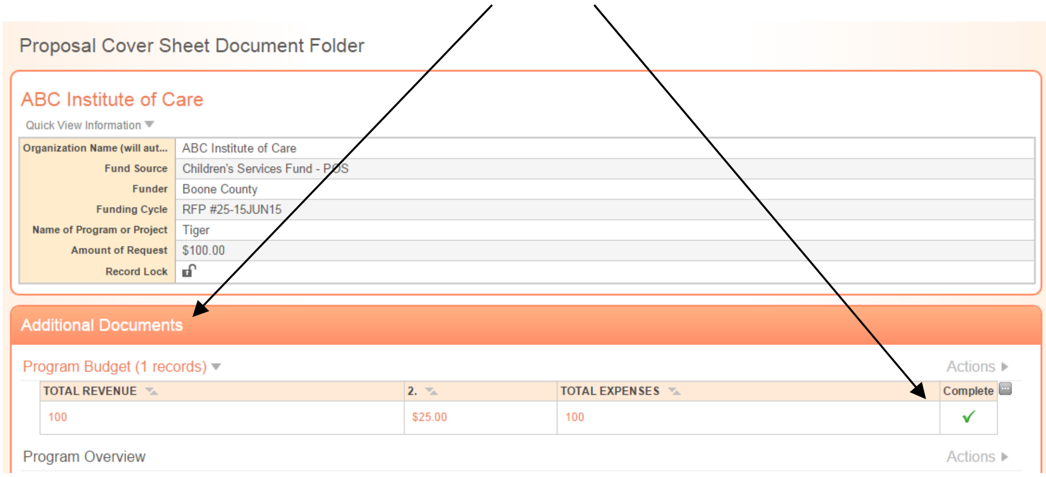
PLEASE NOTE
While not a requirement, it is highly recommended that the proposal forms be completed in the order in which they appear in the **Additional Documents** section as information will be auto-populated as you link the forms.

4. To save a form you have created and/or the information you have entered in a form, click on **Save Record**, in the **Record Options** menu.

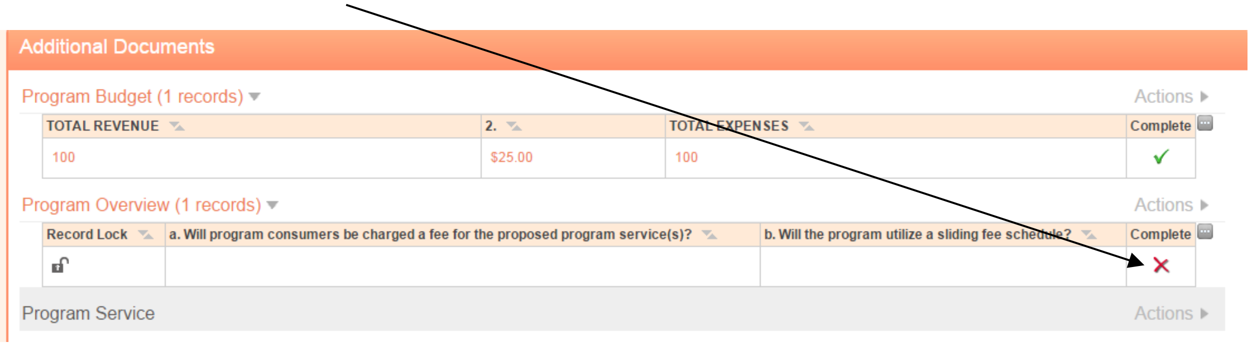


a. After clicking **Save Record**, a pop up window will appear on the screen. This same pop up will appear every time **Save Record** is clicked. Choose the applicable action, as detailed in Section 4.1.

b. If **View Record** is clicked, you will be navigated back to the **Proposal Cover Sheet Document Folder** where the proposal forms are located (under **Additional Documents**). If you have completed a form, there will be a green check mark showing that the form is completed with all of the requirements.

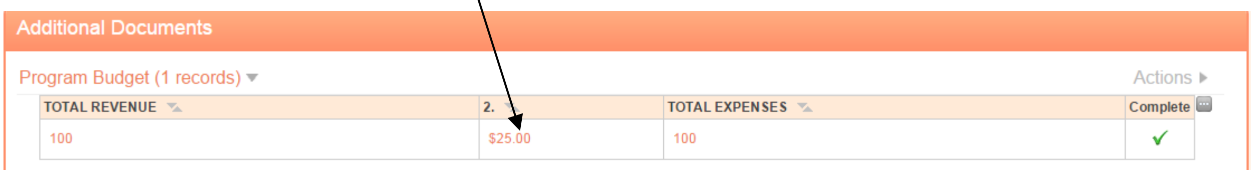


If a red “x” is displayed, the form is incomplete. A user may choose to return to the document and complete the required fields or complete at a later time.



Tip
The red “x” serves as a reminder of what still needs to be completed in the proposal. It can also be found on the right side of the screen, in the box titled, **Record Save Checklist**, which details each specific item that still needs to be completed.

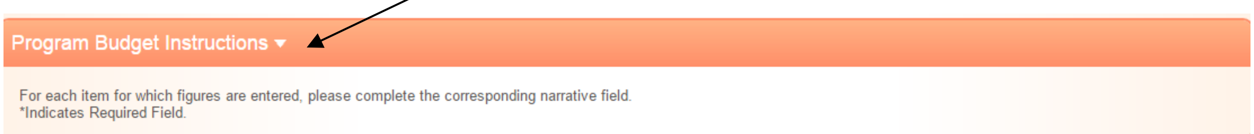
c. Proposal forms can be changed at any time, prior to submitting the proposal, by clicking on any of the fields in the form summary in the **Additional Documents** section.



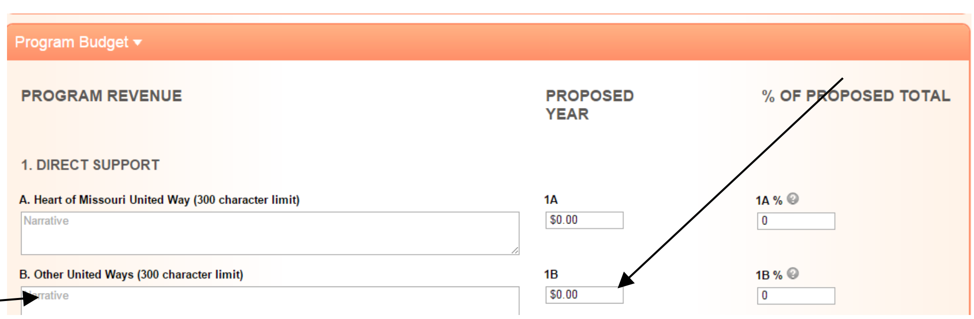
5. Creating and completing a new **Program Budget** form
   a. Per steps 1-4 in this section of the instructions, in the **Proposal Cover Sheet Document Folder**, click on the **Program Budget** form **Actions** and then click **Create New** in the drop down. This will open a new **Program Budget** form.

   b. Save the form.

   c. Read the **Program Budget Instructions**.



   d. In the **Proposed Year** column, complete all applicable revenue fields for the proposed program only. If a figure is entered in this column, the corresponding narrative field must be completed.

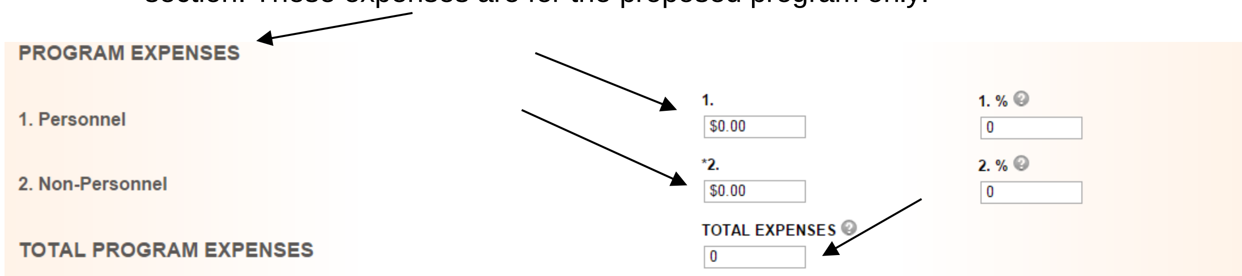


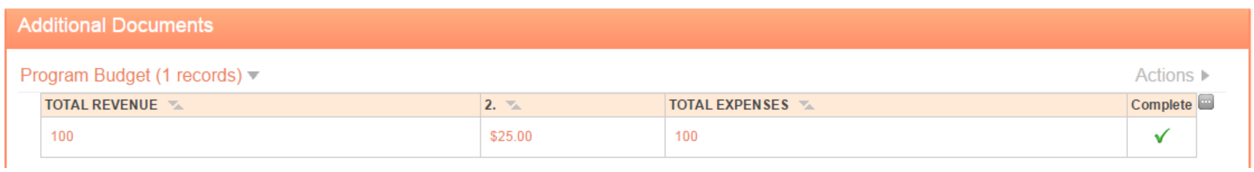
Complete the entire **Program Revenue** section. These figures will total automatically in the **TOTAL REVENUE.**

PLEASE NOTE

- The time period of the proposed year is indicated in each RFP.
- The amount proposed, as indicated on the cover sheet, must match the amount entered in the corresponding funding source.

e. Complete the **Personnel** and the **Non-Personnel** in the **Program Expenses** section. These expenses are for the proposed program only.




Additional Documents

Program Budget (1 records)

Actions

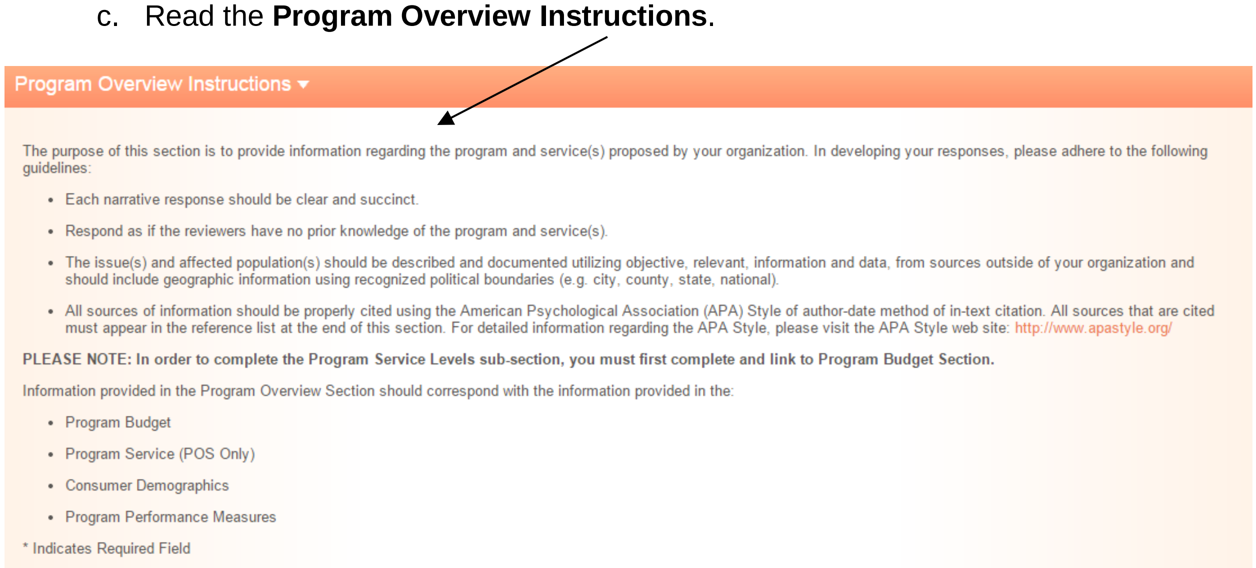
TOTAL REVENUE	2.	TOTAL EXPENSES	Complete
100	$25.00	100	✓

f. Be sure to save the information you have entered.

6. Completing a new **Program Overview** form
   a. Per steps 1-4 in this section of the instructions, in the **Proposal Cover Sheet Document Folder**, click on the **Program Budget** form **Actions** and then click **Create New** in the drop down. This will open a new **Program Overview** form.

   b. Save the form.

   c. Read the **Program Overview Instructions**.


Program Overview Instructions

The purpose of this section is to provide information regarding the program and service(s) proposed by your organization. In developing your responses, please adhere to the following guidelines:

- Each narrative response should be clear and succinct.
- Respond as if the reviewers have no prior knowledge of the program and service(s).
- The issue(s) and affected population(s) should be described and documented utilizing objective, relevant, information and data, from sources outside of your organization and should include geographic information using recognized political boundaries (e.g. city, county, state, national).
- All sources of information should be properly cited using the American Psychological Association (APA) Style of author-date method of in-text citation. All sources that are cited must appear in the reference list at the end of this section. For detailed information regarding the APA Style, please visit the APA Style web site: http://www.apastyle.org/

PLEASE NOTE: In order to complete the Program Service Levels sub-section, you must first complete and link to Program Budget Section.

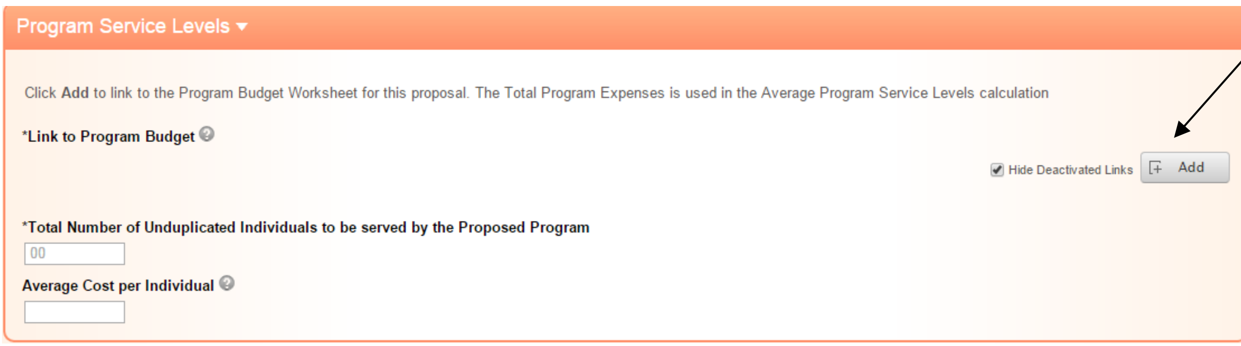
Information provided in the Program Overview Section should correspond with the information provided in the:

- Program Budget
- Program Service (POS Only)
- Consumer Demographics
- Program Performance Measures

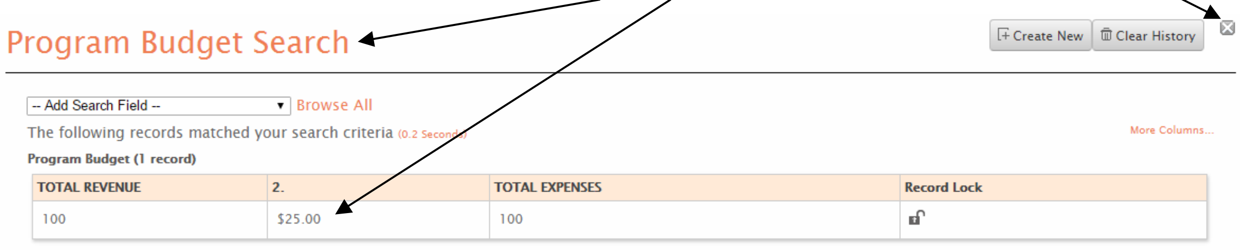
* Indicates Required Field

d. Complete all of the **Program Overview** fields.

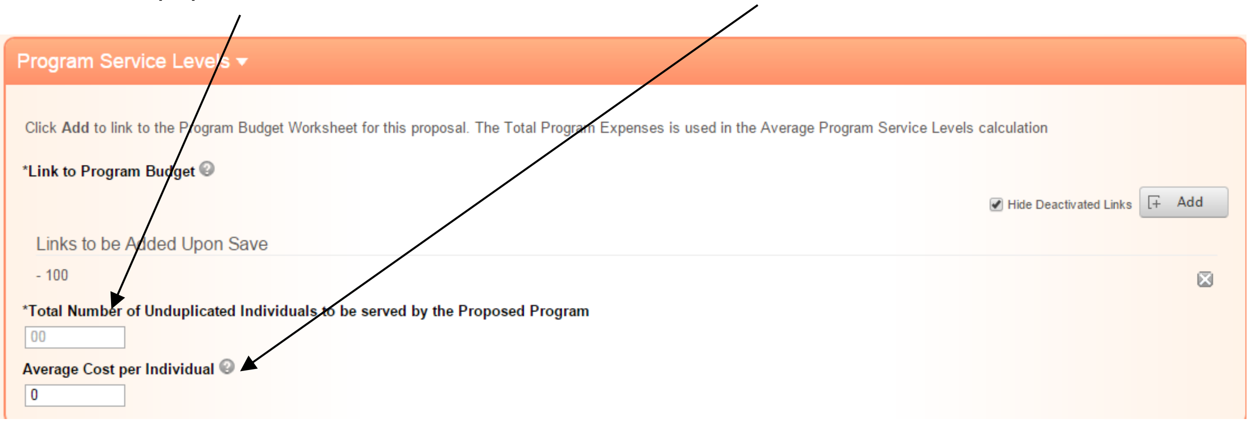
e. The **Program Service Levels** section requires you to perform an action called "linking." To do so, click on the **Add** button on the right side of **Program Service Levels** section.



A **Program Budget Search** window will pop up. Click on any of the **Program Budget** fields to "link" it to the **Program Overview** form. Then click on the "x" in the right-hand corner of the pop up to return to the **Program Overview** form.



Click **Save Record** under the **Record Options** on the right hand portion of the screen. The **Program Budget** is now linked to this section of the **Program Overview form**. Enter the **Total Number of Unduplicated Individuals to be served by the Proposed Program** and then the **Average Cost per Individual** will auto-populate.

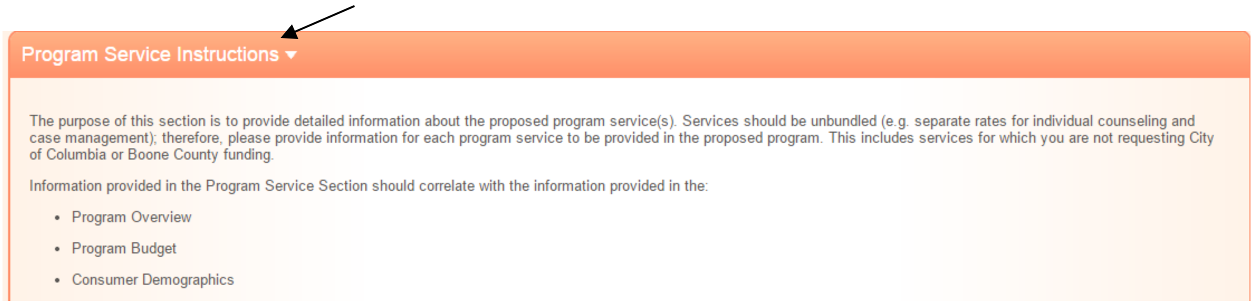


f. Be sure to save the information you have entered.

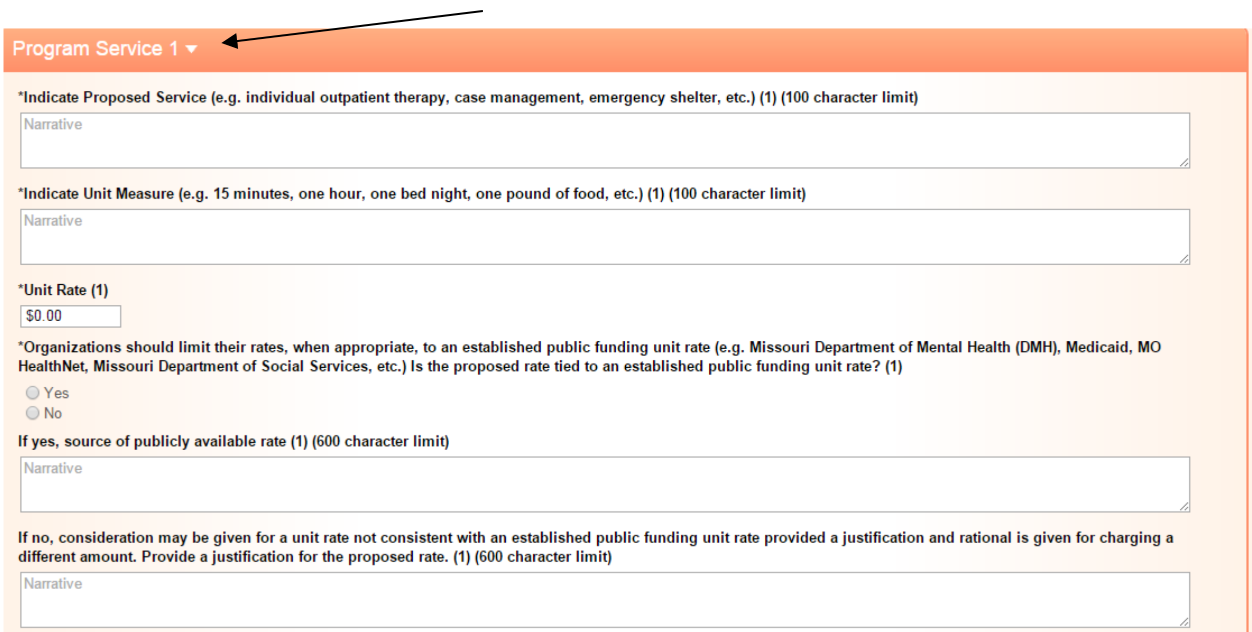
7. Completing a new **Program Service** form (Purchase of Service RFPs only)
   a. Per steps 1-4 in this section of the instructions, in the **Proposal Cover Sheet Document Folder**, click on the **Program Service** form **Actions** and then click **Create New** in the drop down. This will open a new **Program Service** form.

   b. Save the form.

   c. Read the **Program Service Instructions**.



   d. Scroll down to **Program Service 1** and enter information for the proposed program service in this section.



   e. If there are other proposed program services, enter information for each in the subsequent program service sections (e.g. **Program Service 2**, **Program Service 3**, etc.)

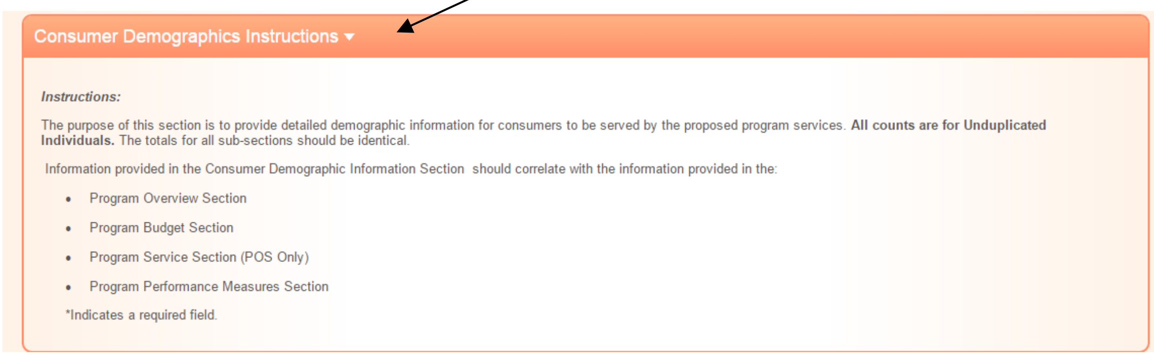
PLEASE NOTE
Required Fields are only indicated for the **Program Service 1** sub-section. However, all fields are required for each program service section.

   f. Be sure to save the information you have entered.

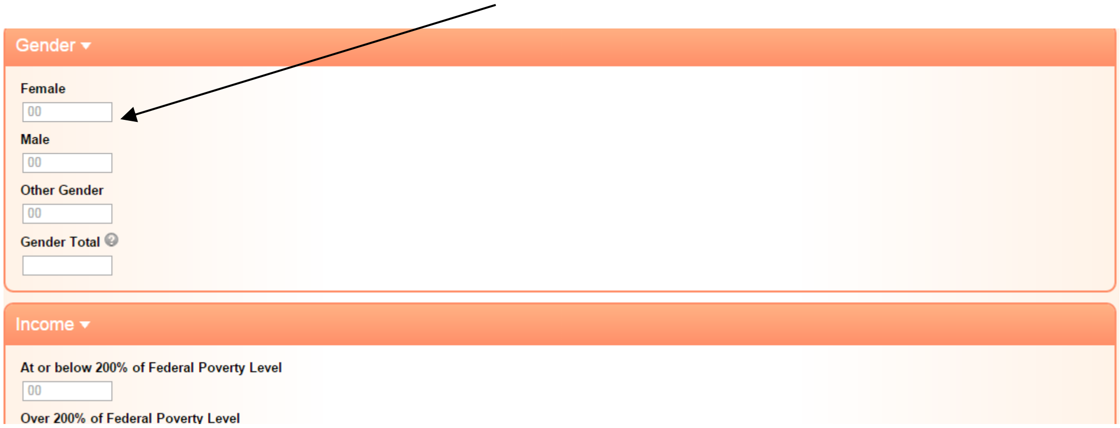
8. Completing a new **Consumer Demographics** form
    a. Per steps 1-4 in this section of the instructions, in the **Proposal Cover Sheet Document Folder**, click on the **Consumer Demographics** form **Actions** and then click **Create New** in the drop down. This will open a new **Consumer Demographics** form.

    b. Save the form.

    c. Read the **Consumer Demographics Instructions**.



    d. Complete all of the applicable **Consumer Demographics** fields.



PLEASE NOTE
- All counts are for unduplicated individuals to be served by the entire proposed program.
- The **Totals** in each section should match.

    e. Be sure to save the information you have entered.

9. Creating a new **Program Performance Measures** form

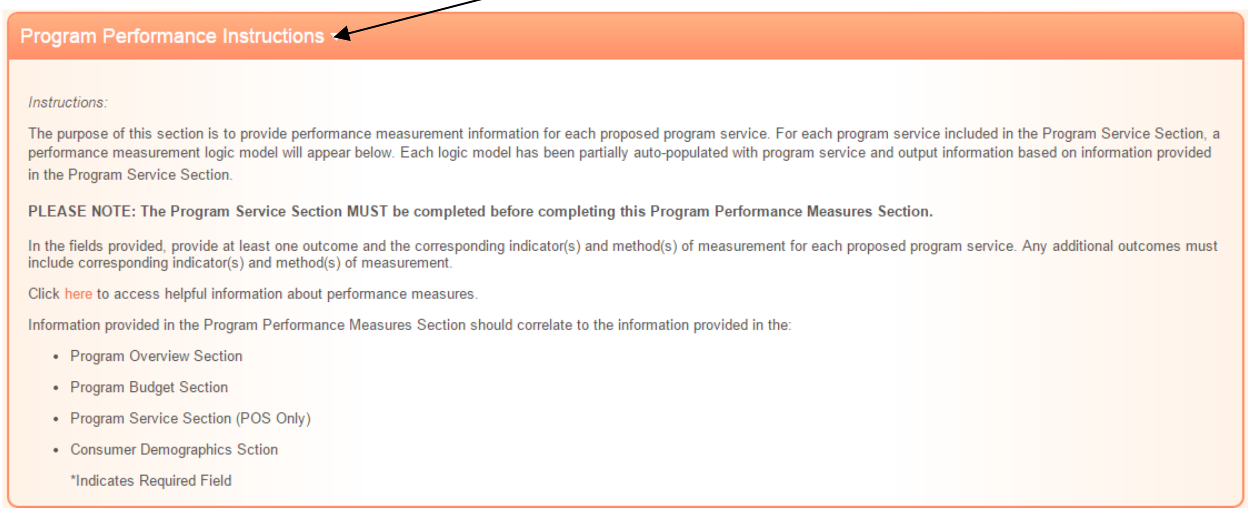
PLEASE NOTE
Purchase of Services RFPs – Refer to 8.1
Pilot RFPs – Refer to 8.2

8.1 Purchase of Service (POS) Performance Measures

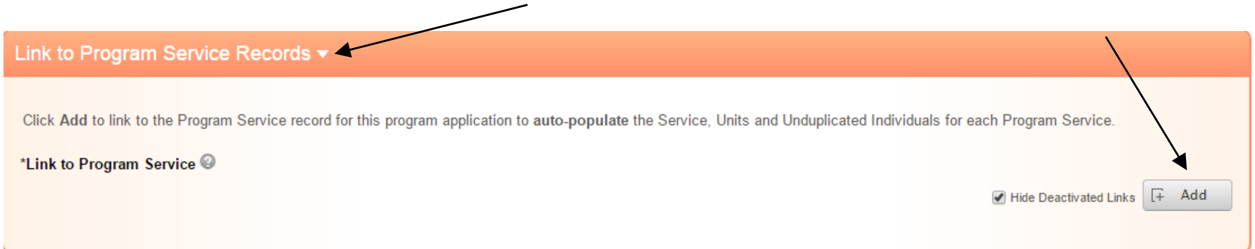
a. Per steps 1-4 in this section of the instructions, in the **Proposal Cover Sheet Document Folder**, click on the **Program Performance Measures** form **Actions** and then click **Create New** in the drop down. This will open a new **Program Performance Measures** form.

b. Save the form.

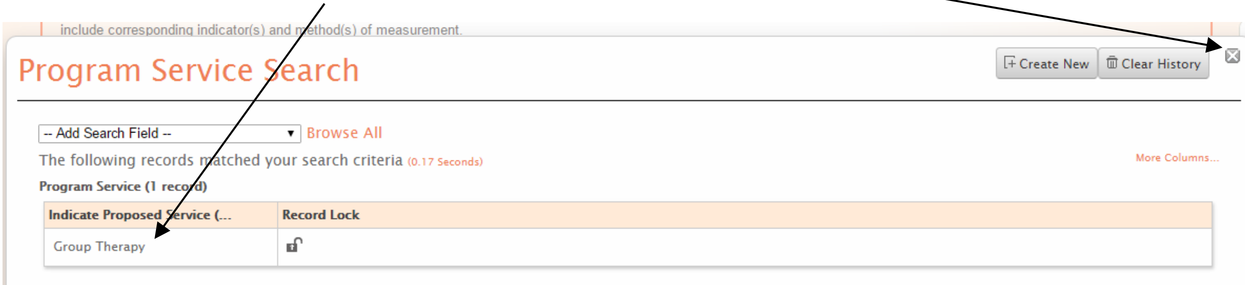
c. Read the **Program Performance Measures Instructions**.



b. The **Program Performance Measures** form requires linking. Click on the **Add** button in the box.



A **Program Service Search** window will pop up once the **Add** button is clicked. Click on any of the fields in the **Program Service** form summary to "link" it to the **Program Service** form. Then click on the "x" in the right hand corner to return to the **Program Performance Measures** form.

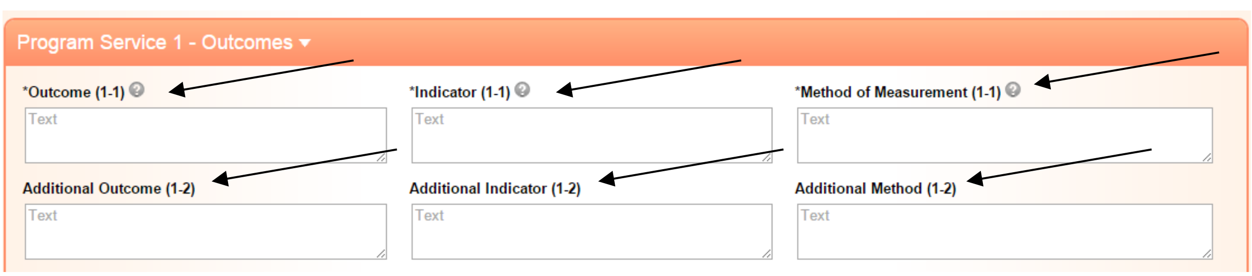


c. Click **Save Record** under the **Record Options** on the right hand portion of the screen. Saving this record will auto-populate portions of this document **Service (1), Units (1), Unit Measure (1), Unduplicated Individuals (1).**

Tip

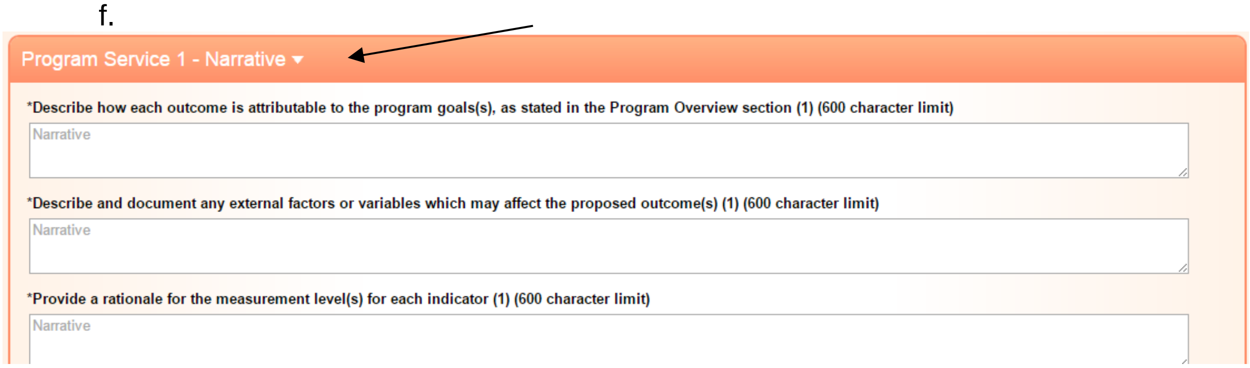
A grayed out box with a lock symbol indicates that the field will be auto-populated. The user doesn't have the ability to enter any information.

d. In the **Program Service 1 - Outcomes** sub-section, complete the **Outcome (1-1)**, **Indicator (1-1)**, and **Method of Measurement (1-1)** for each **Program Service**. If there is more than one **Outcome** for the **Program Service**, add each **Additional Outcome (1-2)** and the corresponding **Additional Indicator (1-2)** and **Additional Method (1-2)**.



e. In the sub-section titled **Program Service 1 – Narrative**, complete all fields for **Program Service 1**.

f.



g. If additional program services are indicated in the **Program Service** form, the **Program Service, Units, Unit Measure, and Unduplicated Individuals** will be auto-populated in sub-sections 2-5. All corresponding fields are required to be completed for each **Program Service**, per steps d. and e. above.

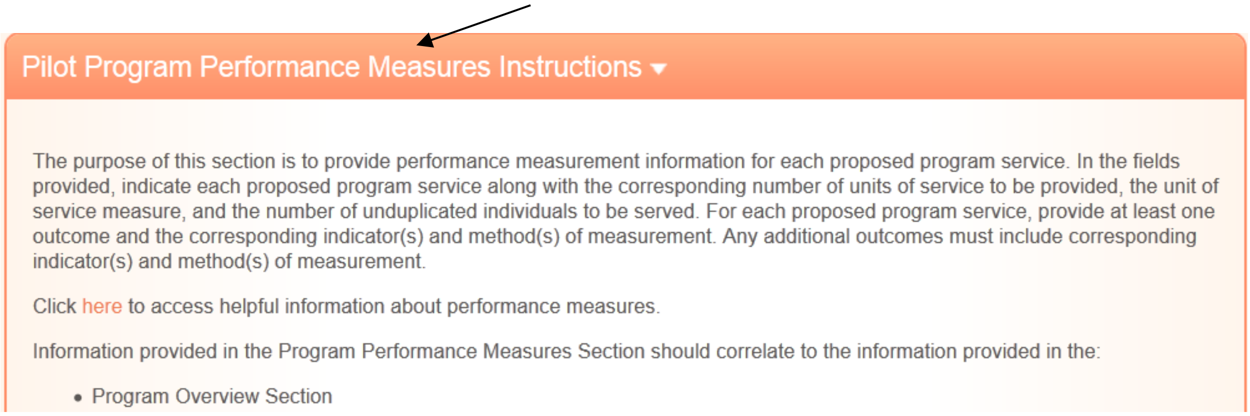
h. Be sure to save the information you have entered.

8.2 Pilot Program Performance Measures

a. Per steps 1-4 in this section of the instructions, in the **Proposal Cover Sheet Document Folder**, click on the **Pilot Program Performance Measures** form **Actions** and then click **Create New** in the drop down. This will open a new **Pilot Program Performance Measures** form.

b. Save the form.

c. Read the **Pilot Program Performance Measures Instructions**.



Pilot Program Performance Measures Instructions

The purpose of this section is to provide performance measurement information for each proposed program service. In the fields provided, indicate each proposed program service along with the corresponding number of units of service to be provided, the unit of service measure, and the number of unduplicated individuals to be served. For each proposed program service, provide at least one outcome and the corresponding indicator(s) and method(s) of measurement. Any additional outcomes must include corresponding indicator(s) and method(s) of measurement.

Click here to access helpful information about performance measures.

Information provided in the Program Performance Measures Section should correlate to the information provided in the:

- Program Overview Section

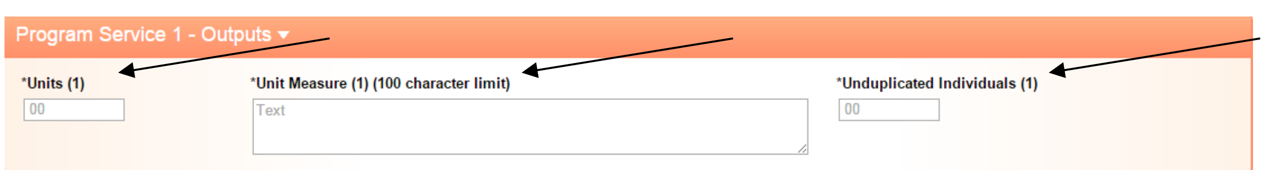
d. Enter information in **the Program Service 1 field.**

Program Service 1

*Program Service (1) (100 character limit)

Text

e. Enter the corresponding **Units (1)**, **Unit Measure (1)**, and **Unduplicated Individuals (1)** to be served in the **Program Service 1 – Outputs** sub-section.



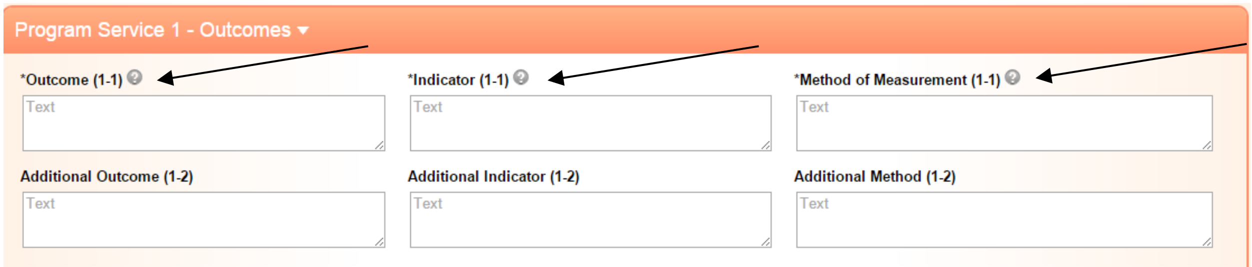
Program Service 1 - Outputs

*Units (1) 00

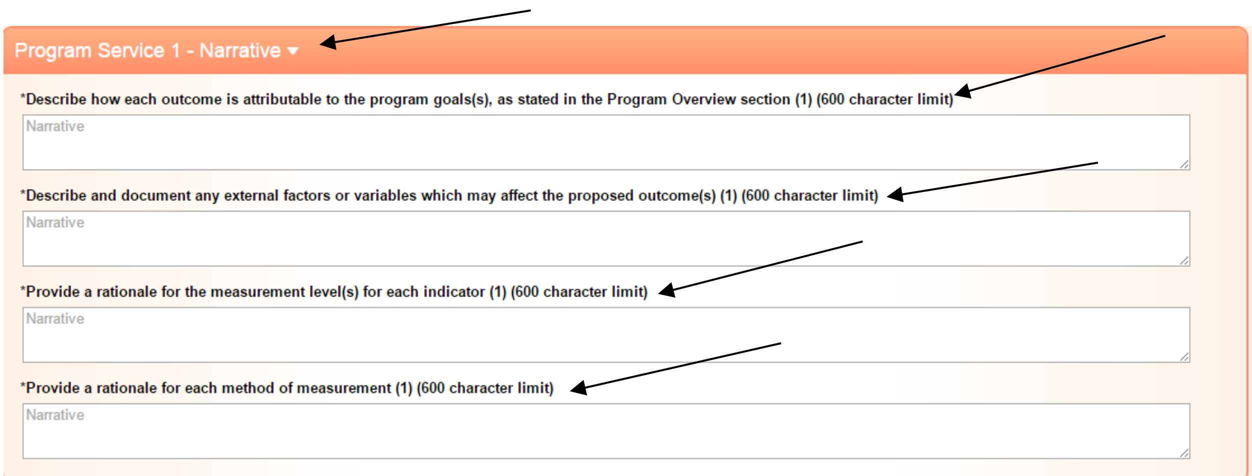
*Unit Measure (1) (100 character limit) Text

*Unduplicated Individuals (1) 00

f. Enter in the **Outcome (1-1)**, **Indicator (1-1)**, and **Method of Measurement (1-1)** in the corresponding fields in the **Program Service 1 – Outcomes** sub-section. If there is more than one **Outcome** for the **Program Service**, add each **Additional Outcome (1-2)** and the corresponding **Additional Indicator (1-2)** and **Additional Method (1-2)**.



g. In the sub-section titled, **Program Service 1 – Narrative**, complete all fields for **Program Service 1**.



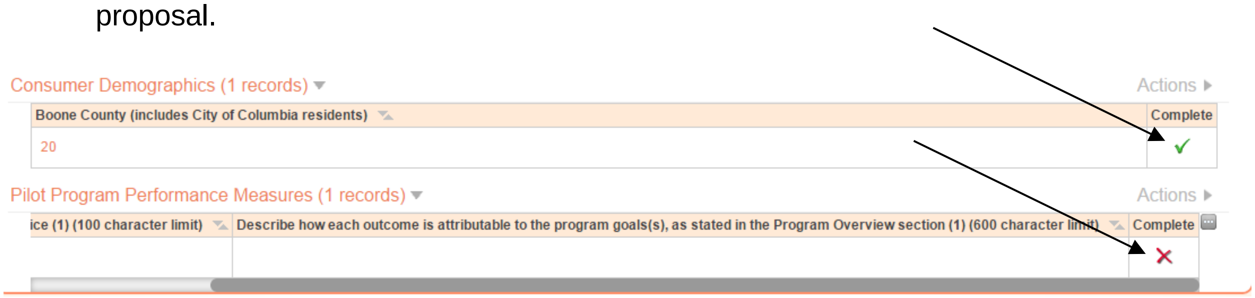
h. For each additional proposed pilot program service, enter information in sub-sections 2-5.

i. Be sure to save the information you have entered

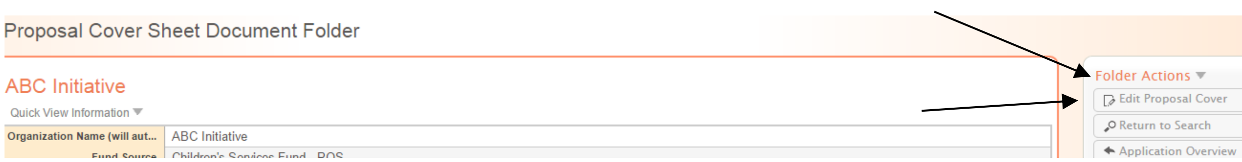
Section 5: Submitting Proposals

Before submitting a proposal(s) it is very important to review both the **Organization Profile** and the **Proposal Cover Sheet Document Folder** to ensure all fields are completed.

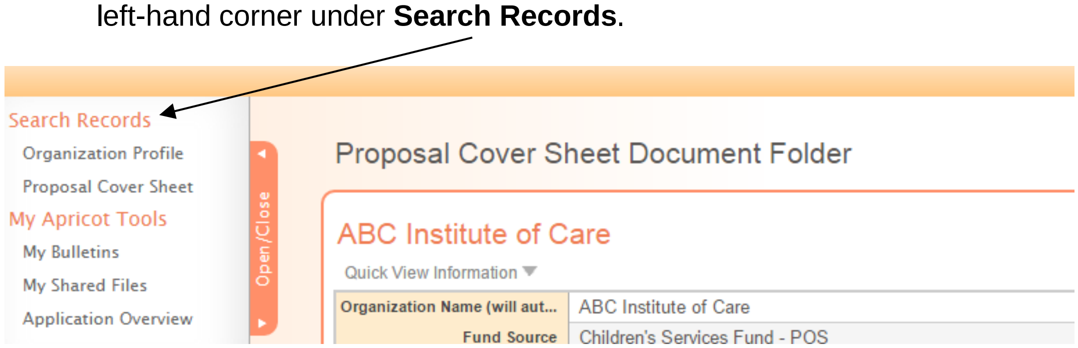
1. **Reviewing the Proposal Cover Sheet Document Folder**
    a. Review the **Additional Documents** section to determine if there are incomplete fields in each of the forms: **Program Budget**, **Program Overview**, **Program Service (POS RFP)**, **Consumer Demographics**, **Program Performance Measures (POS RFPs)** or **Pilot Program Performance Measures (Pilot RFPs)**. A green check mark indicates the form is complete and a red "x" indicates that is incomplete. Forms must be complete, as indicated by a green check, in order to submit a proposal.



    b. Click on **Edit Proposal Cover Sheet** on the right-hand side of the screen under **Folder Actions** to open the **Proposal Cover Sheet**. Review the **Proposal Request Information**, **Program Information**, and **Required Attachments – Children's Services Fund and Community Health** to ensure that all fields are complete and all required attachments are complete.

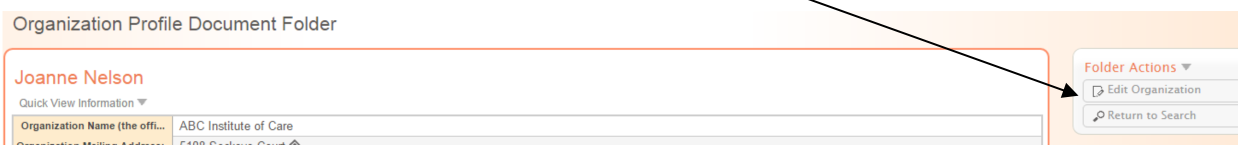


2. **Reviewing the Organization Profile**
    a. To access the **Organization Profile** click on the **Organization Profile** in the upper left-hand corner under **Search Records**.



b. This will navigate you to the **Organization Profile/Organization Profile Search** page. Click on the **Organization Name**.

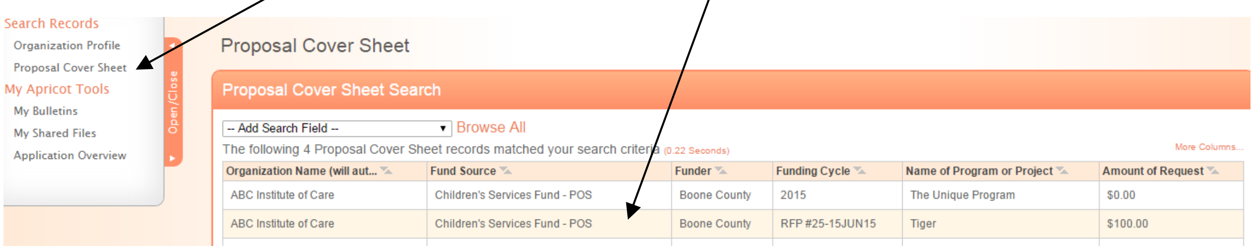
c. This will navigate you to the **Organization Profile Document Folder**. Click on the **Edit Organization** button in the **Folder Actions**.



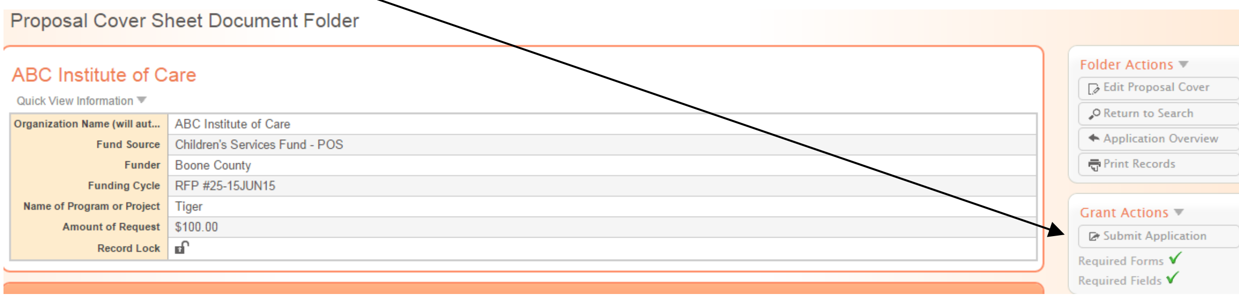
This will open the **Organization Profile** which contains all of the required information for your Organization. Everything must be complete and up to date in the **Organization Profile** in order to submit a proposal.

PLEASE NOTE
Review all the fields in both the **Organization Profile** and the **Proposal Cover Sheet** to ensure that **ALL** fields are appropriately completed.

3. To submit the proposal, return to the **Proposal Cover Sheet Folder** and click on the applicable **Proposal Cover Sheet** for the proposal being submitted.



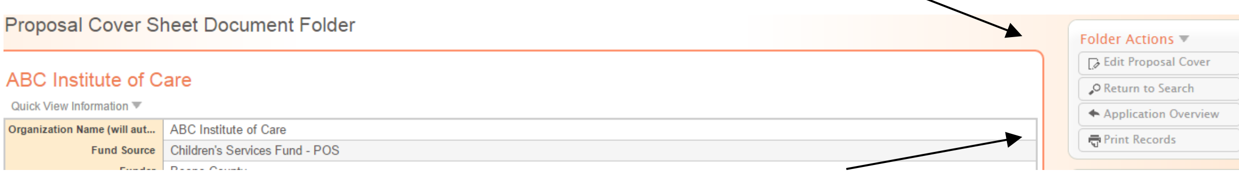
This will navigate you to the **Proposal Cover Sheet Document Folder**. Click on the **Submit Application** under the **Grant Actions**.



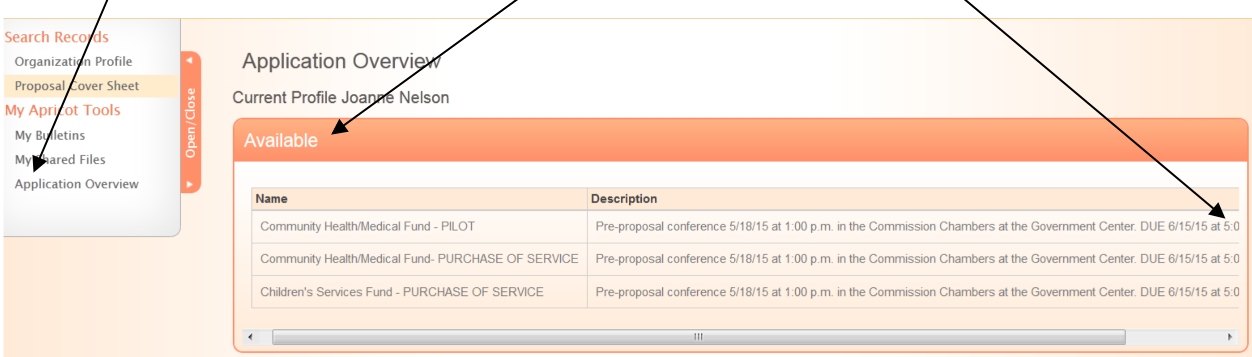
PLEASE NOTE
Make absolutely sure all fields and forms are complete before clicking **Submit Application**. Your proposal cannot be edited once it has been submitted.

Section 6: Helpful Tips

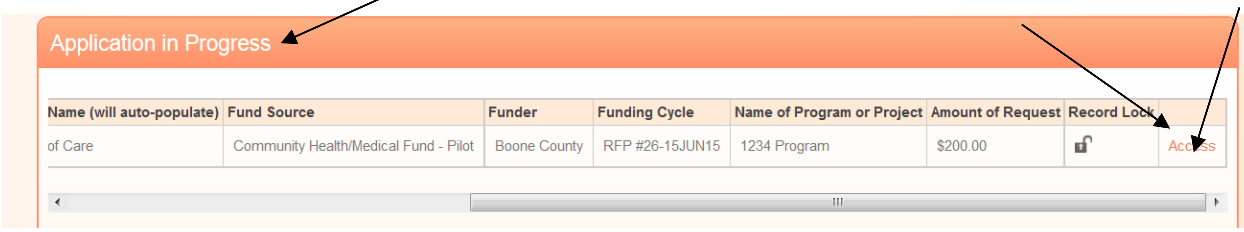
1. Printing records – The ability to print is found under the **Folder Actions** box on the right-hand of the screen under **Print Records**. Follow instructions to print one or more forms.



2. Submitting additional proposals – If you wish to submit more than one proposal, click on **Application Overview** to access **Available** RFPs. Scroll to the right and click on the **Apply** button to start the proposal submission process again.



3. Applications in progress – Click on **Application Overview**, scroll down to **Application in Progress**, scroll to the right and click on **Access**.



4. Symbols – below are common symbols utilized in Apricot.

   a. * = Required Field

   b.  = Open or close viewing of forms.

   c.  = Tool Tip: If the cursor hovers over this it will information about that specific request or requirement.

   d.  = Green check marks indicate that a form is complete.

   e.  = Indicates that a form is incomplete.

   f.  = Enables users to see section values in the **Additional Documents** section.